VERSION 1.0 NOVEMBER 23, 2017

Apps for Greentree

INVENTORY PRICING WORKBENCH

APP NUMBER: 010012

Powered by:

MYOB Greentree

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FEATURES

1. Inventory Pricing Workbench

Set and modify Standard Prices and Advanced Prices in bulk in Greentree using the Inventory Pricing Workbench App.

The App displays prices in a Workbench screen where new prices can be auto-calculated based on userdefined formulae and then individually modified, before being processed to the live Greentree system immediately or saved and updated later. Examples include:

- add 5% to the current Trade price for all stock items
- Set special pricing on a single category of products by marking them down by 25% from RRP
- Display all stock items with a current Margin less than 10% and update them to 20%

Detailed Features

- Work with Standard Price Books or Advanced Pricing
- Select Prices to work with based on a combination of:
 - Price Book
 - Stock Codes and Stock Trees
 - Analysis Codes
 - A Supplier
 - Customers and Customer Trees
 - Sales Reps o current Margin being Greater Than or Less Than a value or percentage, or within a range
 - Items whose last cost was updated after a specified date
- Calculate global price changes on the selected Prices, based on: o Percentage change from current prices o Mark-up or mark-down percentage based on a range of cost and price-book options
- Display and select based on Margin or Markup per Inventory Module control
- Preview the Proposed Price, GP and Percentage Change for each Stock Item Show a price comparison to another Price Book
- Modify individual Prices manually
- Save Proposed changes and return later to edit or apply
- Update live Greentree pricing when you're happy with the changes
- Review the Pricing History for all Prices set or changed using the Inventory Pricing Workbench

IMPORTANT NOTES

The Inventory Pricing Workbench does not support pricing of Quantity Breaks separately. It
will preserve but not necessarily change existing quantity break pricing. You should test all
Pricing updates for products that have Quantity Breaks before applying the changes in a live
system.

OTHER REQUIREMENTS

Greentree Modules: Inventory

Associated Apps: None

11/23/2017

USER INSTRUCTIONS

INSTRUCTIONS

Creating a Price Update and Selecting Records

The App works by creating a Price Update record, containing a selection of prices. Each Price Update record is named uniquely and may be saved and recalled. Simply creating a Price Update does not commit the price changes to the Live Greentree system, so Price Updates can be created for reviewing existing pricing or in preparation for a change some time in the future.

1. Select the menu item | Process | Inventory | Inventory Pricing Workbench |

G Imentory Price							-	
Reference Entered * Price Book to Up			R ₂ Status Proposed Effective T Advanced Pice					
Price Book to Cor Selection Criteria Stock Item Analysis Code	Fion	To 22222 22222	Select by	Suppler				
Markup 1 V Markup 2 Table godate options	() 	9) 9)	Cost Update	OsarTable	Sead: Sox			
I# Global Price Cha Percentage Change	nge 🔅 Ha	4 up	0	Update	Sebet Al Decelect Al Process Onerges Process			
Location (S	S/person Code: S/person !	Lane	Prox Boak.)ten Code	Ban Deac	Analysis Eacle	Analysis Desc	Avg Cost 1
Adding a new love	ntoy Price Change Header			Tee	an 44 Inventory Price Charg	ze Haaden		

2. Complete the header fields

Reference	 Enter a name for this price update, allowing the data to be saved and recalled Note: You can have multiple price updates under way at any time and may want to refer back to a price update in future, so this name should be meaningful
Status	This field is set automatically by the App

Proposed Effective Date Select the date you expect the changes to take effect. Note: This is a memo only and does not schedule the changes to take effect automatically

Price Book to Update Click the radio button if this price update is for a standard Price Book and choose it from the drop-down

 Price Book 	RETAIL	0
	BETAIL	
	SPECIAL TRADE WHOLE	

Price Book to Compare If you want to see the prices from another price for comparison, choose it from the drop down

Advanced Pricing Click if this price update is for a Advanced Pricing and select the pricing method from the drop-down

Advanced Pricing	Customer Code/Analysis Code
	Customer Code/Analysis Code
	Customer Code/Stock Item Code
	Customer Code/Stock Item Tree
	Customer Tree/Analysis Code
	Customer Tree/Stock Item Code
	Price Book/Analysis Code
	Price Book/Stock Item Code
	Price Book/Stock Item Tree

 Select the price records to work with based on the Selection Criteria available.
 Note: The Selection Criteria fields vary depending on whether a Price Book or Advanced Pricing criteria are selected in the header.

Standard Price Book Criteria

Stock Item / Stock Code Choose one, all or a range - by default all are selected

Analysis Code	Choose one, all or a range - by default all are selected
Select by Supplier	Tick and then select the supplier. Stock items on which that supplier has been set up, will appear. To include items only where this is the preferred supplier for a stock item, tick the box below the Supplier Name.

Select I	by Supplier	
Code	🔍 Alpha	θ,
Name		0,
	Include only where preferred supplier	

Margin/ Markup 1	Choose between Dollar Amount and Percentage as the basis by which the records are selected, enter an operator (greater than, less than) and a value to complete the criteria. This allows the user to achieve a price change on a closely targeted range of stock items.
And/ Or	If you want to enter a second "Margin/ Markup criteria" select And – if the items must meet both criteria, Or if the items should match either criteria
Margin/ Markup 2	Choose between Dollar Amount and Percentage as the basis by which the records are selected, enter the second criteria.
You could get items be	low a selected margin or above a selected margin

You could get items below a selected margin or above a selected margin using Or. You could get items where the margin is within a range using and.

Cost Updated After	Select or Enter a date if you only want items whose
	cost has been updated since a specified date – e.g.
	items where the cost has changed in the last 3 months.

Advanced Pricing Additional Criteria

Margin	Percentage 🔍 Less than 🔍 10.01
Margin	Select based on a Dollar Amount or Percentage, specify Greater than or Less Than and enter the amount or percentage. E.g.
Customer Tree	Choose one, all or a range - by default all are selected
Stock Tree	Choose one, all or a range - by default all are selected
Sales Rep	Choose one, all or a range - by default all are selected
Customer Cod	Choose one, all or a range - by default all are selected

Margin	Percentage 🔍	Less than 🔍	10.01
	-		1

4. Click the Search Now button to show the selected records in the clever table below

Table update options G Global Price Change C Mark up Percentage Change					cess Change Select All	1
anda			Update		Deselect All Process	
Item Description	Analysis Code	Analysis Description	Average	Lard	Standard	Que +
E testing 123	CH	(DHA/RS	2975.09	93.00	3532.24	_
TICPLAIN RECEPTION CHAIR	CH	CHAIRS	33.02	35.00	26.32	
BIKE	CH	CHAIRS	0.00	0.00	100.00	
Bite 3	CH	CHAIRS	0.00	0.00	115.00	
Bite 4	CH	CHAIRS	0.00	10.00	150.00	
Detensions Tracking Test Stop	CH	CHAIRS	0.00	0.00	200.00	
Equipment Test B	CH	CHAIRS	0.00	0.00	100.00	_
TEST	CH	CHAIRS	0.00	0.00	100.00	
Euro in tran test items	CH	CHAIRS	12.89	13.00	12.12	
Euro test item 2	CH	CHAIRS	14.53	14.00	15.20	
test PO Reg NOT Allow neg or	СН	CHAIRS	11.95	11.00	12.00	×Č
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Note: Click the Clear Table button to remove the selected records from the clever table

- Tip: Click the sicon in the header to toggle between part-screen and full-screen views of the clever table
- Save the pricing update by clicking on the Save icon in the header.
 Note: This does not commit the updates to the Live system, it just saves the selected
 - records and any price calculations or manual adjustments you have made to-date.

The Current GP% and Proposed GP% will reflect either Margin or Markup per the IN module control – the display is based on values in the table and does not necessarily agree with what shows in Pricing Maintenance.

Changing the Selection Criteria for a Price Update

You can change the criteria for a Price Update at any point and click the Search Now button to refresh the list of prices in the clever table.

The following warning will appear:

G Question?	
You have changed the selection options, do you wan If you answer yes all line items history will be deleted If you answer No a new reference will be created	t to delete the line items history or create a new reference?
likes	No

Click Yes to remove the price records from the clever table

Click No to create a new Price Update, then enter a name for the new Price Update in the Reference field.

Calculating and Adjusting Prices

1. Click the Search Now button to show the selected records in the clever table below

Tip: Click the sicon in the header to toggle between part-screen and full-screen views of the clever table

- 2. To change the existing prices by a fixed percentage
 - a. Click the Global Price Change radio button
 - b. Enter a value in the Percentage Change box e.g. 25 (representing 25%)
 - I. Note: positive value will increase prices and a negative value will decrease prices

Global Price Chang	je
Percentage Change	25

- c. Click the Update button
- 3. To set prices based on a Mark-up from a Standard Price Book
 - a. Click the Mark up radio button
 - b. Choose the Standard Price Book from the drop down
 - c. Enter a value in the Mark Up Percentage box e.g. -25 (a mark-down of 25%)
 - i. Note: a positive value will increase prices and a negative value will decrease prices

Mark	up		
From	RETAIL		T
Mark Up	Percentage	-25	

- d. Click the Update button
- 4. To manually adjust a proposed price
 - a. Click in the Proposed Price column for a Stock Item
 - b. Enter a price
 - c. Note how the Proposed GP % and Percentage Change columns update automatically

Processing Price Changes

Once you are happy with some or all of the Proposed Prices in a Price Update you and are ready to process the changes into your Live Greentree system:

- 1. To select those price records you want to process, either:
 - a. Click on the Select All button

- b. Click the tick box for specific lines in the Update GT column of the clever table
- i. Note: as you select items the number selected is shown in the Process button
- 2. Click the Process button

Pro	ocess Changes
	Process (16)

The status of this Inventory Pricing Workbench job has now been changed to Updated and the date and user for this update captured.

If you do not want to update the prices now, press the Save icon. At a later date you can recall this reference and Process at that point.

Review Pricing Item History

Double clicking on the Date last changed in the row of a stock item will pop up a history of pricing changes which have been done for that item within the Inventory Pricing Workbench. This option will not show prices that have been changed manually through Greentree.

Percentage Change	Date last changed	UOM	Update GT?
3.1500	19 November 2012	EA	
0.7500		EA	
1.5000		EA	
0.7500		EA	

) ate Changed	User	Previous Price	Changed Price
W			
3 November 2012	SUPER	100.0000	110.0000
8 November 2012	SUPER	110.0000	117,7000

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

- 1. Log into Greentree as the Super user
- 2. Select the menu item | System | Apps For Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App

G) App	ps For Greentree Mod						
Enter N	ew Registration Code	Install Ap	p		1	Delete Inactive	e/Expired Apps
	Filter Apps						
Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders		01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	V	31 December 2049	100-Edit User	Change	1
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO (ie 🔽	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing s	lip 🔽	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit	n 🔽	31 December 2099	24-Edit Users	Change	
					1	7	

4. Select/Highlight the Inventory Pricing Workbench App.

(G Арр	os For Greentree Mo	odule Control						
	Enter Ne	ew Registration Code		Install App			<u>[</u>	<u>)</u> elete Inactive	/Expired Apps
		Filter Apps	010012						
I	Code	Name	Description		Active	Expiry Date	User Count	Settings	App Count
l	010012	IN Pricing Workbench	Inventory pricing workbench			31 December 2049	100-Edit User		

5. Click on the Edit Users button and select the users who will be configured to use Active Directory Integration, for which companies.

G Apps For Gr	eentree Manager App l	Jser Access Q 🞻			
User Count Limit	100				
User	e-Computers - Australia ((e-Computers - Canada (0	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users					
001 EDI AK					
001 EDI HN					
ADMIN					
Amanda				V	
andrew				V	
Angela				V	
Angela Allen					
April Aston					
ashlin					

- 6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.
- 7. Save and Close the form.

CONFIGURATION

| System | Inventory | Module Control

Main Defaults (Options Serial/Lot Details Lab	els Inventory Search	Variable Weights	Auto generate co
Calendar	MARCH	X		
Costing				
Method	Average Cost	T		
Level	Location Level	T.		
Тах Туре	Exclusive	Ψ.		
Decimal Unit	4 Decimal Places	w.		
Allow System Cos	t Change			
Pricing				
Level	Master Level	4		
Тах Туре	Exclusive	w.		
Decimal Unit	4 Decimal Places	T.		
Markup Indicator	% Entered and Shown as Mark	Ups V Cost Base	Average Cost	V

The Markup Indicator determines whether the selections and display in the pricing workbench show Markup or Margin